

Setting Work Expectations

STEP #1: Draft your work expectations after meeting with your supervisor

Meet with your supervisor to begin drafting work expectations for the year. During the meeting you need to determine three (3) to five (5) major job duties. For each major job duty you will draft outcomes (results), performance standards, and resources needed. Take notes during this meeting and use them to complete the work expectation drafting steps below.

Keep in mind this is the first draft of your work expectations. Your supervisor will further refine the work expectations in the next step. So, they do not need to be perfect or complete at this point.

Employee

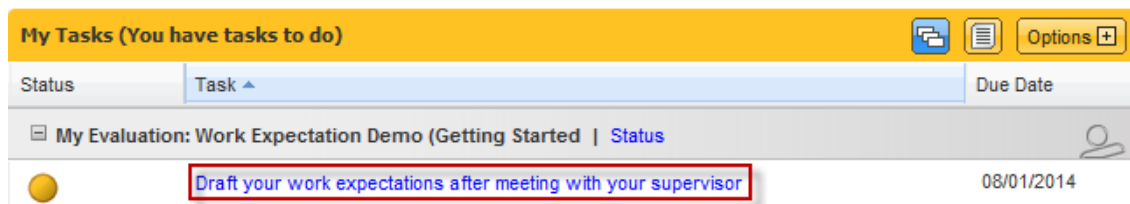
1. You will receive an e-mail from *Perform Minneapolis* stating you have a task to complete in the setting work expectations process.

Click on the link provided in the e-mail message to access Halogen.

2. At the Halogen login screen, type your username and password.

NOTE: Your password is what you chose when you activated your Halogen account.

3. The **My Tasks** screen will appear showing your first step in the process.




Click on [Draft your work expectations after meeting with your supervisor](#).

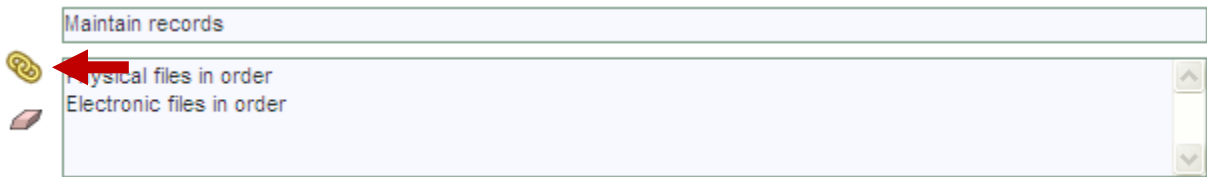
4. The **Employee Work Expectations** form will appear.

Read the entire form before you begin to add work expectations.

Using the notes you took during your meeting with your supervisor, fill in the Major Job Duties, Outcomes (results), Performance Standards, and Resources needed. Again, this is the first draft and your supervisor will have the chance to make

additions and edits in the next step of the process. As the employee, you can fill in as much information as you wish. What you do not complete your supervisor can add in the next step.

5. Link each Major Job Duty to a city or department goal by clicking the Link to Organization Goal icon () next to the Major Job Duty. You should link to the lowest level that applies (e.g. department goal vs. city goal).



6. The Goal Link Details page will appear. The first level goals are the City goals. Clicking the “+” next to a goal will expand to show lower level goals (e.g. department goals).

NOTE: Select your department from the drop-down list for Category to highlight and find your department goals.



7. Select a goal by clicking in the box (☐) next to the name of the goal. Ideally, you will link to the lowest level goal associated with the job duties. A check mark (✓) will appear next to the goal you select.

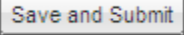


8. Click “Link” to complete the process of linking a city/department goal to a major job duty.



You will see  next to major job duties that are linked to a city or department goal.

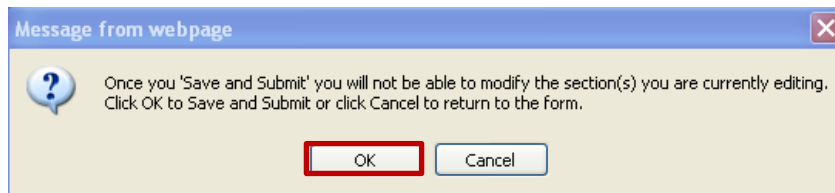
NOTE: Repeat steps 5-8 for each Major Job Duty on the form.

9. When you are done adding your work expectations, click  located at the top of the form. You will no longer be able to edit your work expectations and the form will now go to your supervisor for final edits.


NOTE: If you are not done drafting your work expectations, you can click

 and complete the work expectations setting form later.

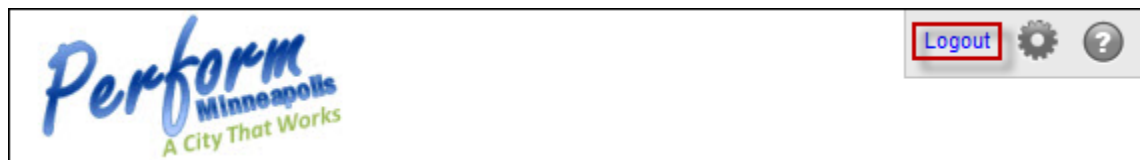
10. Spell check and language check will run. Make corrections as appropriate.
11. A warning dialog box will appear stating you will no longer be able to access and edit the form. Click “OK”.



12. The completed Employee Work Expectations form will appear.

Close the form by clicking  in the top-right corner of the form.

13. Log out of Halogen



STEP #2: Finalize work expectations for your employee

Once your employee finishes drafting their work expectations, you will need to review and approve them. This is the last step that allows editing of the work expectations. Follow the steps below to review and approve the final version of your employee's work expectations.

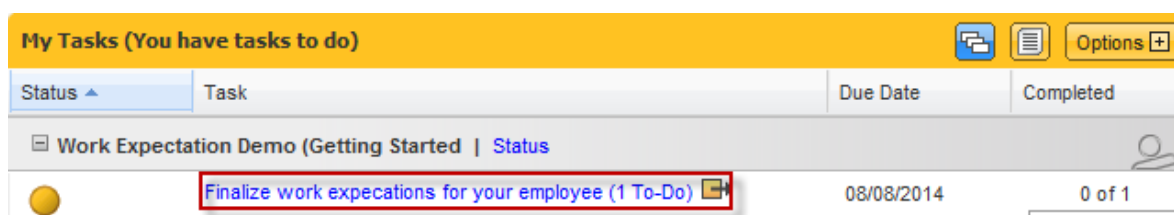
Supervisor

1. You will receive an e-mail from *Perform Minneapolis* stating you have a task to complete in the work expectations setting process.

Click on link provided in the e-mail message to access Halogen.

2. At the Halogen login screen, type your username and password.

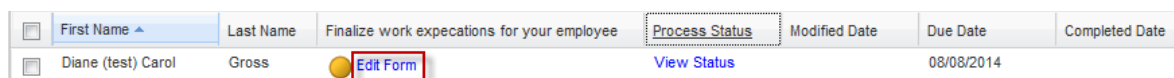
The **My Tasks** screen will appear showing what you have "To-Do".



Click on **Finalize work expectations for your employee (# To-Do)**.

NOTE: If you have more than one employee reporting to you, you may have more than one "To-Do" listed.

3. The Appraisal Tasks screen will appear.

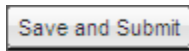


Click on **Edit Form** for the employee listed.

NOTE: If you have more than one employee listed, repeat steps 3-9 for each employee.

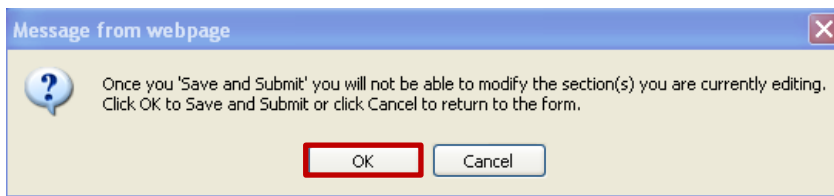
4. The Employee Work Expectations form will appear. It contains the work expectations your employee entered in the first step of the setting work expectations process.
5. Read the content of the form thoroughly. Review the work expectations and make changes or additions as you see fit.

6. Once you are satisfied with the content of the form (**this is the last step you can make changes to the work expectations**), click “Save and Submit” located at the top of the form.




NOTE: If you want to come back to the form later to continue editing the work expectations, click “Save as Draft” -- .

7. Spell check and language check will run. Correct entries as necessary.
8. A warning dialog box will appear stating you will no longer be able to access and edit the form. Click “OK”.



9. The completed form will appear.

Close the form by clicking  in the top-right corner of the form.

The work expectations form is now complete and will go back to your employee for “sign off”.

10. Log out of Halogen.



Step #3: Employee signs off on work expectations

When your supervisor is done reviewing and finalizing your work expectations, you will need to “sign off” on them. Signing off indicates you have met with your supervisor to discuss the work expectations and have read and understand the work expectations that will be used as the basis for on-going feedback (including a performance appraisal), recognition, and development. This step will capture an electronic signature which indicates the date and time you signed off. This is your last step in the setting work expectations process.

Employee

1. You will receive an e-mail from *Perform Minneapolis* stating you have a task to complete in the setting work expectations process.

Click on link provided to access Halogen.

2. At the Halogen login screen, type your username and password.
3. The My Tasks screen will appear showing the step you need to complete.

Status	Task	Due Date
✓	Draft your work expectations after meeting with your supervisor	08/01/2014
●	Sign-off on your work expectations	08/15/2014

Legend: Overdue My To-Do Sent for Review Not Ready Completed

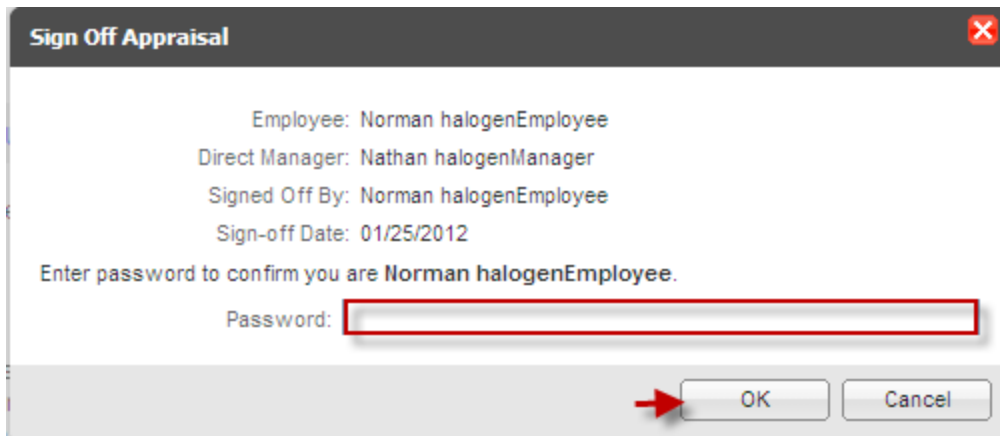
Click on [Sign-off on your work expectations](#).

4. The completed Employee Work Expectations form will appear. If your supervisor made any changes, they will be reflected on the form.

Review the form and accept the final version by clicking on “Sign Off” at the top of the form.


Sign Off

5. Since the system is capturing electronic signatures, you will be asked to provide your Halogen password to complete the sign-off.

A screenshot of a 'Sign Off Appraisal' dialog box. The title bar is dark gray with a red 'X' icon in the top right corner. The main area is white and contains the following text: 'Employee: Norman halogenEmployee', 'Direct Manager: Nathan halogenManager', 'Signed Off By: Norman halogenEmployee', and 'Sign-off Date: 01/25/2012'. Below this, it says 'Enter password to confirm you are Norman halogenEmployee.' followed by a 'Password:' label and a text input field. The input field is highlighted with a red border. At the bottom right, there are 'OK' and 'Cancel' buttons. A red arrow points to the 'OK' button.

Type your password and click “OK”.

6. Your form will save as a pdf and display on the screen. You can see your electronic signature was added at the bottom of the form.

Close the form by clicking  in the upper-right corner of the form.

This is your final step (as an employee) in the goal setting process. The form will now go back to your supervisor for their “sign off”.

7. Logout of Halogen.



The planning phase (setting work expectations) is now complete and you will move into the monitoring phase of the performance management.

Note: Your work expectations can be found on the My Performance page in Halogen. This is also where your completed work expectations form is saved (under Forms).